

Client # _____

REHABILITATION TRACKING SHEET

Homeowner: _____

Address: _____

Telephone: Home () _____ Work () _____

Initial Application/Inquiry Date: _____

PRESETTLEMENT ACTIVITIES

Activity Description	Date Requested	Date Received/ Completed	Comments
Preliminary Application			
Full Application			
Credit Report(s)			
Verification of Income/Employment			
Verification of Mortgage(s) or Deed of Trust for Each Lien Secured by Property			
Verification of Deposits			
Verification of Public Assistance			
Verification of Other Assets			
Mortgage Lender's Most Recent Year-End Statement			
Proof That Real Estate Taxes Are Paid and Current			
Title Evidence			
Appraisal			
Lead-Paint Notification			
Work Write-Up/Cost Estimates			
State Historic Review (If Applicable)			
Borrower's Review/Approval of Work Write-Up			
Loan Approval/Disapproval			
Bid Proposal(s) from Contractor			
Owner Review of Proposals/Rehab Specialist Review of Proposals			
Contractor Selection			
Contract Signing			
Right of Recission			

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CONSTRUCTION AND CLOSE-OUT

Activity Description	Date Completed or Sent	Comments
Pre-Construction Conference		
Notice to Proceed		
Request for Progress Payments		
Request #1		
Request #2		
Change Orders		
#1		
#2		
Certification of Final Inspection		
Request for Final Payment		
Notice of Completion		
Contractor's Release of Liens/ Warranties		
Disposition of Funds Statement		

LOAN SETTLEMENT

Activity Description	Date Requested	Date Received/ Completed	Comments
Truth-in-Lending Disclosure Statement			
Notice of Right-to-Cancel			
Promissory Note			
Mortgage or Deed of Trust			
Hazard Insurance, Taxes, Special Assessments			
Supplemental Financing Agreement			
Repayment Schedule			
Record Mortgage, Deed of Trust, or Promissory Note			